Program Person Status Mismatch

Priority Level: 1

Programs Impacted: AAP, CalFresh, CalWORKs, Foster Care, GA/GR, Medi-Cal, Nutrition Benefits, RCA

Background

During the conversion cutover from CalWIN to CalSAWS, the system will run a Batch EDBC job for all active CalWIN cases. If the CalSAWS Batch EDBC results match the last saved CalWIN EDBC result, the system considers the benefits a **match** and saves EDBC. If the CalSAWS Batch EDBC **does not match** the existing saved CalWIN EDBC, the case will be flagged with a Yellow Banner and the _Batch EDBC is not saved_.

CalWIN Benefits will roll forward until the next EDBC is run in CalSAWS.

When EDBC is run during conversion cutover in CalSAWS, the Program Person Status Mismatch does not match what was determined in the CalWIN System. Person Statuses are mismatched like Active or Denied or Discontinued between the last saved CalWIN EDBC results and the converted data in CalSAWS.

Run EDBC in CalSAWS to find the Person Status mismatches and compare to the last saved and converted CalWIN EDBC. Based on the differences, Users will need to verify the results, update the data collection records, if applicable, take action based on county policy and authorize the EDBC results.

These cases will be identified in the **Conversion EDBC Case Review Report** as follows:
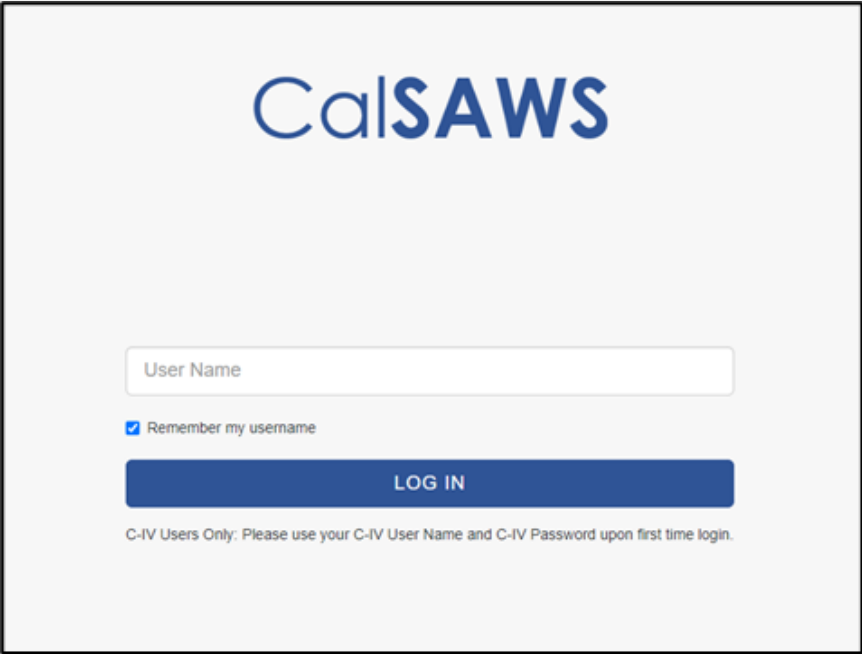
COUNTY_CODE	COUNTY_NAME	OFFICE_NUM_IDENTIF	OFFICE_NAME	WORKER_NUMBER	CASE_NUMBER	PROGRAM	MISMATCH_REASON	RE_DUE_DATE	PGM_STAT_RSN_CODE	PRIORITY	SSA_INCOME	SSI_SSP_OPA
00	Sample	00	1305 Sample	xxxxxxxxxx	xxxxxxx	CalWORKs	Program Person Status Mismatch	06/30/2022		1		

Note: The examples provided in these guides do not represent every scenario that a user might encounter. The scenarios provided below are intended to direct users to the most impacted areas on the Yellow Banner report. A full and thorough review of each case must be conducted to ensure that all the information is entered as accurately as possible to allow for a correct determination to be made.

Example

Program Person Status Mismatch

	Steps To Clear Alert	Screenshot
1	Log in to CalSAWS by entering your Username and Password	
2	On the Homepage: 1. Enter the case number and click on the submit button to be directed to the **Case Summary** page. ⭐ **Note:** this step is not necessary if already in the **Case Summary** page for the desired case	

Steps To Clear Alert	Screenshot
⭐ Note the Yellow Banner on the Case Summary Page	

Steps To Clear Alert	Screenshot
3 On the **Case Summary** Page: 1. Click on the **Eligibility** tab on the Global navigator. 2. Click on the **Customer Information** tab on the Local navigator. From the Contact Summary page: 3. Click on **Run EDBC** on the Task navigator.	

Steps To Clear Alert	Screenshot

4   On **the Run EDBC** page:

1. Select all applicable **Programs.**

⭐   Note: Program fields must be selected first or the Begin and End Months will show grayed out.

2. Populate your **Begin Month** and **End Month** with the next future Month. **Do not use multi-month EDBC to clear a Yellow Banner EDBC Mismatch alert.**

3. Click **Run EDBC**

⚠️   Ensure all programs on a case are selected when running EDBC as each program can have its own EDBC Mismatch reason. EDBC Mismatch follows program hierarchy and requires all programs be run at the same time to clear all EDBC Mismatch reasons on a case.

When running EDBC, there are two types of validations that a User may experience if eligibility criteria is missing or pending.

When experiencing a **Hard Validation,** EDBC <u>cannot</u> be run without the appropriate updates made to the data collection pages.

When experiencing a **Soft Validation,** EDBC <u>can</u> still be run without making changes to the data collection pages. Follow your county policy.

⭐   **Note:** Although a Soft Validation will allow the user to run EBDC and remove the Yellow Banner, the pending verifications may result in a negative case action and/or potential over issuance. Follow your county policy.

Steps To Clear Alert	Screenshot
5 Run EDBC in CalSAWS to find the Person Status mismatches compared with the last CalWIN run Conversion EDBC. The last saved CalWORKs EDBC results were for **02/2022**. In this example, Users will compare the **07/2022** future month CalWORKs EDBC result against the **02/2022** EDBC result. Users should review EDBC results to ensure accuracy before accepting results.	

Steps To Clear Alert	Screenshot
6 When comparing the last saved CalWORKs EDBC Summary results, there is an EDBC Program Person Status Mismatch as **Kaden, 18M** person status and status reason changed from **Active** in 02/2022, to showing **Discontinued** with a status reason of having reached **Age 18 Requirements**. ⚠️ If the EDBC results are not what you expected, you will need to Troubleshoot. Review the case and data collection pages to verify the information was entered correctly. Correct any data entry errors. Then, run EDBC again. Accept EDBC results if results are as expected. Do **NOT** Accept or Save EDBC Results that you think may be wrong. You will have the option to preview the NOA before it is sent out to the Applicant/Participant, by clicking the Preview NOAs button after EDBC results have been accepted. Follow county policy when Troubleshooting EDBC Results. Additional Job Aids are available in CalSAWS in the **Help Icon** located in the Utilities navigator: **JA EDBC – Troubleshooting Incorrect Results** **JA EDBC - Online Definitions and Troubleshooting** Continue to review and authorize EDBC results for any CalFresh and Medi-Cal programs.	

Steps To Clear Alert	**Screenshot**
7 When comparing the last saved CalFresh EDBC Summary results from **2/2022** against the CalFresh EDBC Summary results for **07/2022**, the entire household status corresponds with the CalWORKs EDBC Summary results. ⚠️ Remember to check for any missing verifications, reports received, or images awaiting review for potential case changes prior to running EDBC and authorizing future benefit EDBC results for both CalFresh (possible TCF) and Medi-Cal programs. Accept EDBC results if results are as expected.	
The **Medi-Cal EDBC Summary** page will display the following: • Benefit Month and Program Status • EDBC Information • Program Configuration • Reporting Configuration • Medi-Cal Summary The eligibility for this household should reflect the accurate eligibility for the benefit program (Medi-Cal). The EDBC results can be saved by clicking the **Accept** button located on the top right or bottom right of the summary. Once the Medi-Cal program results have been saved, this will redirect Users to the **EDBC List** page.	

Steps To Clear Alert	Screenshot
8 The **EDBC List** page will display the following: • A message to inform the user that a Notice of Action was created. • A **Preview NOA** button, which allows the user to view the notice prior to distribution. • A **Save and Continue** button, which allows the user to save all the actions taken. Review the NOA's for accuracy: 1. Click the **Save and Continue** button. This will direct the user to the **Distributed Documents Search** page, where the NOA will be in a **Pending Review** status.	

Steps To Clear Alert	Screenshot
9 In the **Distributed Documents** Search: 1. Click on the hyperlink for the NOA with the "**Pending Review**" status to view the NOA and select a method of distribution. If the NOA is not reviewed it will go out due to an overnight batch process.	

Steps To Clear Alert	Screenshot
10 Users will be directed to a PDF preview of the NOA. Users will have the following options: • **Append:** User can make limited edits to NOA if necessary • **Save and Print Locally:** User will save NOA to the case and will need to manually print the NOA for distribution. • **Save and Print Centrally:** User will save the NOA to the case and the NOA will be sent out by central printing during nightly batch. • **Reject:** User will reject the NOA, the NOA will still display in the case as a rejected status • **Cancel:** User can cancel, this will leave the NOA in a "pending review" status. Select the appropriate status for the NOA. This will update the status in the **Distributed Document Search** page.	

Steps To Clear Alert	Screenshot
13 Once the Notices of Actions are reviewed, accepted, and saved; journal the action taken according to county policy. Navigate back to the **Case Summary** page. The Yellow Banner will no longer appear on the case. The case review is complete!	